

Morgan Stanley

The Green Jade Group at Morgan Stanley's Wealth Planning Preparedness Checklist

The Green Jade Group at Morgan Stanley has created a 12 step action list that will put you and your family on the path to financial preparedness. Being prepared in the event of an emergency is paramount to ensuring your family's financial wellbeing. Please review the steps below to assess the financial wellbeing of you and your family. It will take only a couple of minutes.

Planning to Protect Your Family

- Worked with your estate planning attorney to draft a Last Will and Testament, Health Care Directive, Health Care Proxy and Durable Power of Attorney
- Compiled a list of all financial accounts, passwords, safe deposit boxes, life insurance and important contacts for next of kin and placed it in a secure place
- Reviewed all insurance vehicles (life, health, disability, umbrella, pet, property and casualty and director and officer) to ensure proper liability coverage
- Established a cybersecurity and identity theft protection plan

Financial Account Titling and Legacy Planning

- Reviewed titling of all investment and bank accounts with your attorney and financial professional
- Updated all 401(k), IRA, Annuity and Life Insurance beneficiaries to ensure they align with your estate planning wishes
- Drafted a Family Wish and Intention Letter

Budgeting

- Placed 6-12 months of emergency savings in a liquid, interest bearing savings account
- Compiled a personal financial statement listing all assets and liabilities
- Created a family budget and update on a quarterly basis based on real-time expenditures and unforeseen out of pocket expenses

Life Goals

- Planned for lifestyle aspirations in retirement
- Reviewed potentially passing wealth to the next generation(s) and your philanthropic intentions

If you have checked:

10-12 boxes, Congratulations! You are well on your way to financial preparedness!

5-7 boxes, Attention! You are off to a great start and have more work to do.

1-4 boxes, ALERT! Your family's financial wellbeing could be in jeopardy. You should speak to a financial professional immediately.

The Green Jade Group's mission is to take the mystery and complexity out of managing your financial life. We use our "Three 'S' Philosophy" of Simplifying, Supporting and Steering your unique financial journey to ensure your financial preparedness.

Please reach out to us to schedule an introductory conversation to see if we would be a good fit to help you and your family.

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